



Issue 1 | January 2024

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Dear Monika,

Looks like we can get in one final “Happy New Year” before the calendar turns to February! We hope the first month of the year has been a good start to 2024.

At Miles Consulting, we started the year off by bringing in two new team members. We are excited to welcome both Heidi Ragland and Kristy Caston to our team. They both have many years of great experience and we are excited to begin introducing them to clients. Check out a little bit more about each of them (and a link to their profiles on our website) below. And stay tuned for spotlights of them in upcoming editions of the newsletter.

This month, we also launched our first annual 2023/24 Financial Leaders Benchmarking Survey. Its purpose is to develop and share a major benchmarking report for financial leaders and professionals around trends that accounting managers, controllers, CFOs and other financial leaders are seeing. The survey takes about 5 minutes to complete and we’d be very grateful if you’d take the time to complete it. If you would like to receive a copy of the results you can leave us your email at the end. We will not be connecting your email to your results - your entries are confidential. Miles Consulting Group believe in honest, open data and so your response is anonymous. Thanks in advance for your participation and support. Please feel free to send to your colleagues as well!

After all that, we hope you’ll take a few minutes to review our articles below on how to best prepare for a sales tax voluntary disclosure agreement and we review the taxability of SaaS in 18 key states.

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Fondly,
Monika Miles & Bill Loew
Miles Consulting Group, Inc.

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PREPARING FOR A SALES TAX VOLUNTARY DISCLOSURE PROGRAM: BEST PRACTICES AND STRATEGIES

Voluntary disclosure programs stand as important points of resolution for businesses navigating potential sales tax and state income tax non-compliance issues. Understanding the nuances of these programs is crucial for enterprises seeking to rectify their tax affairs. In this article we'll focus on voluntary disclosure agreements (known as "VDAs" in the state tax arena) as they relate mostly to sales tax and state income tax. Note that each state has its own process for engaging in these remedies and there is no "one-size fits all" although there are similarities among the programs.



To learn more about preparing for a sales tax voluntary disclosure program: best practices and strategies, [click here](#).

WHAT TO KNOW ABOUT THE TAXABILITY OF SAAS IN 18 KEY STATES

Every now and then we write a blog or article that really resonates with our readers. And while we wish that you found every article this

riveting, we are happy to report that the article below about the taxability of SaaS in 20 jurisdictions is our most popular blog to date, based on hits on the blog and our website. In this blog, originally published in 2021 and refreshed just a couple months ago, we look at several of the largest states and how they treat the SaaS



revenue stream. As you know from reading our articles, this can be a very nuanced area. Please let us know how we can make it even better in our next revision!

To read more about SaaS in 18 Key States, [click here](#).

WELCOME HEIDI RAGLAND AND KRISTY CASTON TO MILES CONSULTING GROUP

Please meet the newest members of the Miles Consulting Team, Heidi Ragland and Kristy Caston. Heidi joins us as a senior tax manager and has previous experience working both in industry and for state departments of revenue. Kristy joins us as a senior tax consultant and will be focusing her time with our sales tax compliance group. She is our first TX based team member. Stay tuned to learn more about them next month.



To view their profiles on the Miles Consulting Group homepage, [click here](#).



MILES CONSULTING'S FIRST ANNUAL SURVEY OF LEADERS IN FINANCE

If you follow Monika on [LinkedIn](#) you may have read that one of our first goals of 2024 began with sharing our first annual [survey of Leaders in Finance](#).



This is a major benchmarking survey, the data and insights of which will support finance leaders across the SaaS and technology industry. The survey takes less than 5 minutes, is anonymous, and by completing it, you not only help us to contribute valuable industry insights, but you will also be supporting a whole industry of financial leaders.

So, if you are a CFO or Senior Finance

Leader working in the SaaS and/or Tech industry we'd be incredibly grateful if you could complete the [survey](#).

What's Up at Miles Consulting?

Networking:

[NAWBO-SV](#)

Join us for the NAWBO Empower Hour. It is on Thursday, February 1 from 2 pm to 3 pm. NAWBO Empower Hour is a small-group mastermind webinar that solves 2 business problems each week. Meet and network with other business owners in this national forum. For more information, [click here](#).

Join us for the Product Makers Group. It takes place on Tuesday, February 6 from 2 pm to 3 pm. Join this group each month on Zoom to chat about your business and use the collective wisdom of the room to talk through any where/how sell ideas, problems and opportunities you have. For more information, [click here](#).

The Galentine's Fundraiser is at Kendra Scott's (334 Santana Row San Jose, CA) on Tue. Feb. 13 from 4 pm to 7 pm. For more information, [click here](#).

Join NAWBO for Monthly Virtual Connections on Tuesday, February 20 from 9 am to 10 am. Rebecca Maxwell will be your host and guide as you build relationships that will strengthen your network during small group conversations in safe, welcoming spaces. For more information, [click here](#).

Join NAWBO for Mentoring Monday on Monday, February 26 from 9 am to 11 am at Villa Ragusa (35 second street Campbell, CA). Make the one connection that can change everything at Mentoring Monday. For more information, [click here](#).

[AFWA](#)

AFWA events are currently on hold. Stay tuned for more information.

Educating/Speaking:

Our blogs are frequently featured on [Tax Connections](#).

Don't forget- We do customized multi-state tax presentations for local accounting firms; invite us to do one at your firm! Stay tuned for upcoming webinars!

For more information, please call us at 408-266-2259

About Miles Consulting

Miles Consulting Group is a professional services firm specializing in multi-state tax solutions. We address state and local tax issues for our clients, including general state tax consulting, nexus & taxability reviews, audit support, voluntary disclosure agreements, and other special projects.

We also specialize in SaaS and other technology industries. For more information, visit

www.milesconsultinggroup.com.

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